

Job Aid:

How to Create a Bid Using Rolling and Open enrollment

This Job Aid shows how to:

- Create a Bid from Scratch

Of Special Note:

Bids are documents used to request price quotes and post opportunities for contracts from potential vendors for goods or services. They are used when goods or services are not already on a contract (statewide or departmental). Bids can either be a one-time request for goods and services, which would turn into an open market purchase order, or they can become a Master Blanket Purchase Order in COMMBUYS (formerly known as a contract or Master Agreement). They can also become a SWC (Statewide Contract) or Departmental Contract. This job aid will start at the point of creating a new bid, without a Requisition. Please review OSD policy if you have any questions.

Bid Types:

Open: Allows any vendor to submit a response, even vendors not originally notified of the Bid upon posting on COMMBUYS. Open Bids should be used for all procurements unless they fall into one of the situations where a Closed Bid is appropriate

- **Unrestricted:** Default on the Bidders tab
 - Visible externally and open to all vendors for response
- **Restricted:** User must make this selection on the Bidders tab
 - Visible externally but displays security message when viewer not logged in

Closed: User must make this selection on the General tab. Appropriate only in limited circumstances when a public bid is not required. For example, this option is appropriate for issuing bids (Requests for Quotes) against Statewide and Departmental Contracts, where the pool of eligible vendors is already established

- This selection does not show externally, but is visible only to selected vendors when they are logged in

Formal: Bids are “formal” by default and maybe either open or closed. Formal bids are used for all procurements unless they fall into one of the situations where an Informal Bid is appropriate. Formal Bids with multiple awards result in “Open Enrollment” Qualified Contractor Lists, as described in How to Draft a Request for Response.

- Default on the Vendor tab. No action is required to make a Bid formal.
- Prohibit Basic Purchasing users from viewing any submitted responses until the Opening Date/Time has been reached

Informal: Can be either open or closed. Appropriate only in limited circumstances for issuing bids (Requests for Quotes) against Statewide and Departmental Contracts to establish “Rolling Enrollment” Qualified Contractor Lists, as described in How to Draft a Request for Response.

- Allow “Purchaser” to view vendor responses prior to the Opening Date/Time

Rolling enrollment: Allows you to accept bids and review them as they come. The contract end date should not change. The contract end date should be at least a year after the last enrollment period

Open Enrollment: Allows the SSST can re-open the contract at any time (or at set intervals) to add new vendors. The contract end date should not change. The contract end date should be at least a year after the last enrollment period.

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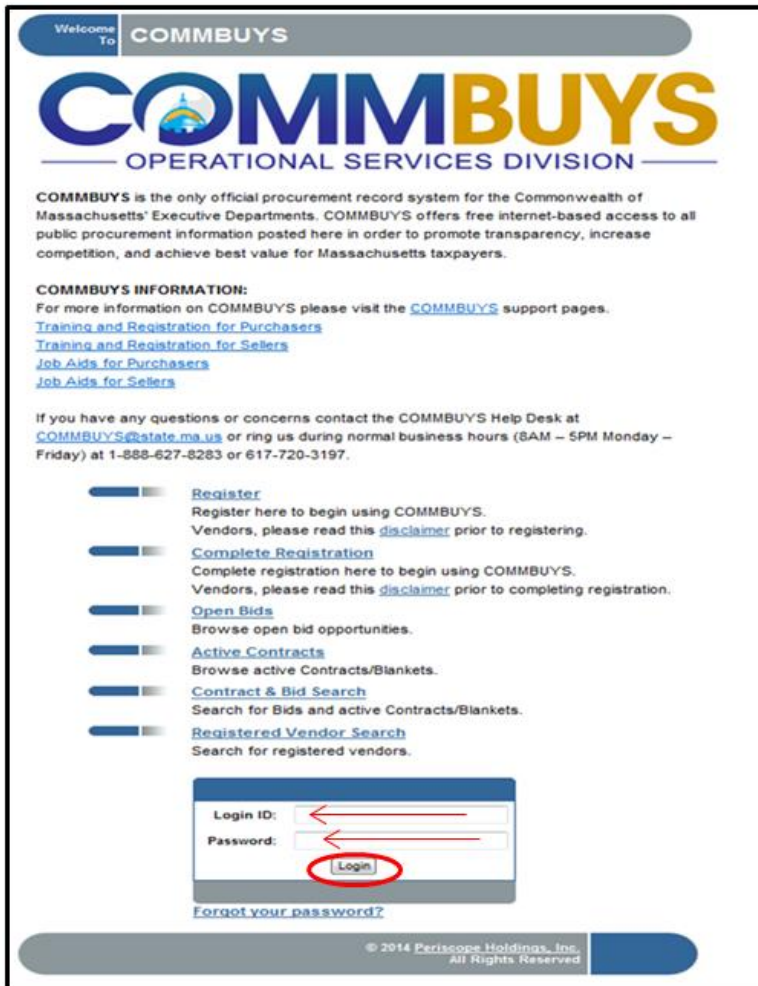
Screenshot

Directions

Step1. Launch the COMMBUYS Web site by entering the URL

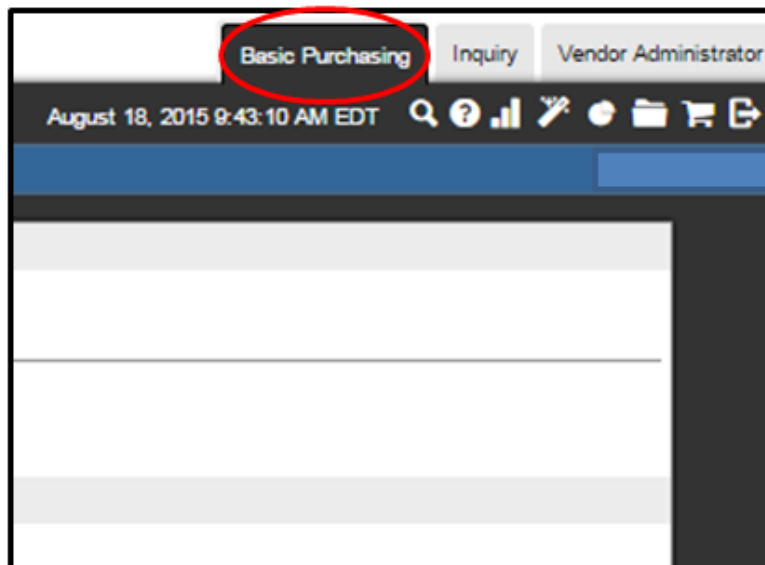
<https://www.commbuys.com/bs/> in the Browser.

- Enter your login ID and Password
- Click the **Login** button



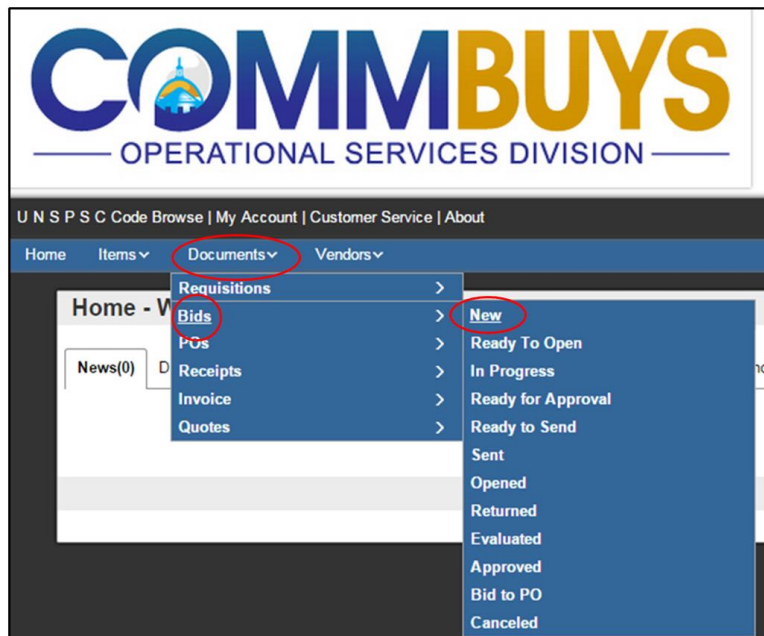
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Step2 Select the **Basic Purchasing** tab on the upper right side of the page.

Note: If you only have one user role, Basic Purchasing, no tabs display.



Step3 From the Navigation Bar, select **Documents > Bids > New**

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Create a New Bid

Please select the method to create a new bid:

- ☒ Create a bid from scratch
- ☐ Clone a bid from another document.
- ☐ Copy Contracts For Renewal.

Continue

Cancel & Exit

Step4 Create a new bid

- Select **create a bid from scratch**
- Click **continue**

New Bid

General Items Address Accounting Routing Attachments Notes Bidders Amendments Q & A Reminders Summary

Bid Number: _____


Status: 2BI - In Progress


How Solicited: Email

Department: *

Location: *

Show on Web: ☒

Required Date: 

Available Date: *(MM/DD/YYYY HH:MM:SS AM or PM) 

Bid Type: Open Bid

Control Code:

Print Dest Detail: Always

Purchase Method: * Open Market

Tax Rate:

Solicitation Enabled: No

Item Single Award Only: ☐

Info Contact:

Pre-Bid Conference: (Max size: 250 characters)

Bulletin Desc: (Max size: 500 characters)

Quote Notification: ☐

Invoice Method: Three Way Match

Date Last Updated: _____

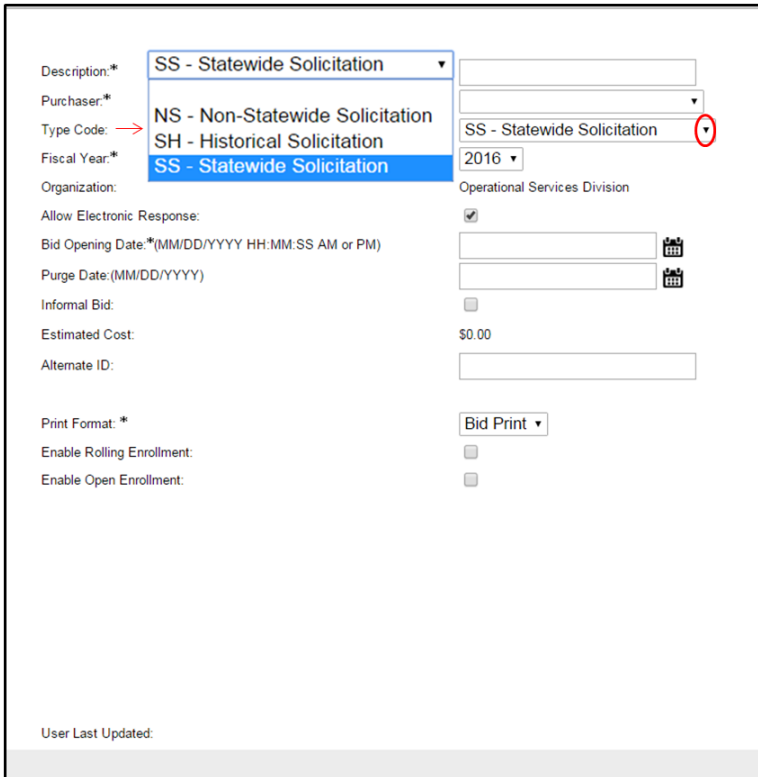
Save & Continue

Step5 The screen opens to the General tab of the Bid. On the left side of the screen, complete the following fields:

- **Department:** defaults from user profile. May be changed, using the dropdown if other departments are available to user.
- **Location:** defaults from user profile. May be changed, using the dropdown if other locations are available to user.
- **Required by Date:** optional
- **Requisition Type:** Open Market
- **Requester:** user that created the requisition; this field cannot be edited
- **Contact:** contact for this requisition
- **Estimated Cost:** calculated by COMMBUYS; not editable by user
- **Alternate ID:** leave blank
- **Special Instructions;** Fill in as needed.

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Description:* SS - Statewide Solicitation
 Purchaser:* NS - Non-Statewide Solicitation
 Type Code: → SH - Historical Solicitation
 Fiscal Year:* SS - Statewide Solicitation
 Organization: Operational Services Division
 Allow Electronic Response: ☒
 Bid Opening Date:*(MM/DD/YYYY HH:MM:SS AM or PM)
 Purge Date:(MM/DD/YYYY)
 Informal Bid: ☐
 Estimated Cost: \$0.00
 Alternate ID:
 Print Format: * Bid Print
 Enable Rolling Enrollment: ☐
 Enable Open Enrollment: ☐

User Last Updated:

Step6 The right half of the **General** tab, complete the following fields:

- **Description:** be specific as this field is also used as search criteria to locate a requisition.
- **Purchaser:** defaults to your name; use the dropdown to select a different purchaser
- **Type Code:** : type options are based upon the requisition type
- **Fiscal Year:** defaults to the current Fiscal Year
- **Organization:** Defaults to your Organization, change if necessary.
- **Enable Rolling Enrollment:** Allows you to accept bids and review them as they come. The contract end date should not change.
- **Enable Open Enrollment:** Allows the SSST can re-open the contract at any time (or at set intervals) to add new vendors. The contract end date should not change.

Enable Rolling Enrollment: ☐

Enable Open Enrollment: ☐

Step7A Select Rolling or Open Enrollment

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Step7B Select Enable Rolling Enrollment.

This function will automatically check the informal bid box.

Informal Bid:
☒

Estimated Cost:

\$0.00

Alternate ID:

Print Format: *

Bid Print ▾

Enable Rolling Enrollment:
☒

Enable Open Enrollment:
☐

Step7C Select Enable Open Enrollment

This function will open up a set of enrollment periods for the user to fill in the start date and end date. It also allows the user to add additional enrollment periods.

NOTE: In either case the bid should be completed as instructed in the supporting Job Aids.


Please refer to Job Aids:

- How to Create a Bid from a Requisition
- How to Create a Bid from Scratch

Enable Rolling Enrollment:
☐

Enable Open Enrollment:
☒

Enrollment Periods:

Delete	Start Date	End Date
	<input type="text"/>	<input type="text"/>

Add Enrollment Period